The California Developmental Disabilities Information System

CADDIS Training

Course Outline

CADDIS 301-B System Administration Training for Regional Centers

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Course Purpose and Objectives

Course Purpose

This course will teach Regional Center staff how to perform System Administration activities in CADDIS.

Course Objectives

In this CADDIS course, you will learn the following:

- Module One – CADDIS Navigation
- Module Two – Overview of System Administration for Regional Centers
- Module Three – User setup
- Module Four – User group setup
- Module Five – User sessions
- Module Six – Workflow processing and alerts
- Module Seven – System setup
- Module Eight – Fiscal and trust administrative setup

Course Pre-requisites

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Following are the pre-requisites that each participant should have in order to successfully complete this course.

- Computer Literacy – Strong understanding of Microsoft Windows applications including using the World Wide Web and launching/closing applications.
- Policies and Procedures – An overall understanding of how Regional Centers administer the DDS programs and policies as they relate to his/her functional area. An understanding of Regional Center policies and procedures.
- Current job skills – Experienced and competent with System Administration processes.
- Technical Skills – SQL or other database experience and a high-level understanding of System Architecture.

Additional Course Details

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- Estimated course duration – 2 days
- Delivery Method – Informal instructor-led with hands-on practice
- Training Material for the course:
  - CADDIS System Operations Manual
  - CADDIS User Manual
  - DevA Environment
- Target Audience – Regional Center System Administration staff

Course Outline

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Day One

Module One – CADDIS Navigation

(Estimated module duration – 45 minutes)

- Lesson One – How to Log into CADDIS, view the Home Page, and view the Message Center
- Lesson Two – How to Navigate in CADDIS
- Lesson Three – How to add, copy, update, and delete
- Lesson Four – How to use the Screen Print feature
- Lesson Five – How to use the Custom Comments and Tokens
- Lesson Six – Timing out of CADDIS

Module Two – Overview of System Administration for Regional Centers

(Estimated module duration – 30 minutes)

- Lesson One – Overview of DDS System Administration responsibilities
- Lesson Two – Overview of Regional Center System Administration responsibilities
- Lesson Three – Overview of report sharing

Module Three – User Set Up

(Estimated module duration – 45 minutes)

- Lesson One – How to create new user accounts and passwords
- Lesson Two – How to update and delete user accounts and passwords
- Lesson Three – How to reactivate user accounts

Module Four – User Group Set Up

(Estimated module duration – 2 hours and 30 minutes)

- Lesson One – How to create new user groups
- Lesson Two – How to add users to groups using the user group and user screens
- Lesson Three – How to assign role based security
- Lesson Four – How to assign screen access to user groups
- Lesson Five – How to assign users to restricted tabs (tab level security)

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Module Five – User Sessions

(Estimated module duration – 15 minutes)

- Lesson One – How to view user sessions

Module Six – Workflow Processing and Alerts (Part One)

(Estimated module duration – 3 hours)

- Lesson One – How to setup workflows

Day Two

Module Six – Workflow Processing and Alerts (Part Two)

(Estimated module duration – 45 minutes)

- Lesson Two – How to setup alerts
- Lesson Three – How to setup messages

Module Seven – System Setup (Part One – System Administration)

(Estimated module duration – 1 hour)

- Lesson One – How to view the error log
- Lesson Two – How to setup an audit trail
- Lesson Three – How to setup custom comments

Module Seven – System Setup (Part Two – Program Administration)

(Estimated module duration – 3 hours and 15 minutes)

- Lesson Five – How to setup an organization
- Lesson Six – How to setup a facility
- Lesson Seven -- How to setup signing and co-signing rights
- Lesson Eight – Overview of Inter and Intra-Regional Center Transfers
- Lesson Nine – How to perform clinical setup activities
    - How to configure the service plan library
    - How to setup service plan types
    - How to setup service plan review types
    - How to setup case note types

Module Eight – Fiscal and Trust Administrative Setup

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(Estimated module duration – 2 hours and 45 minutes)

- Lesson One – How to create General Ledger accounts
- Lesson Two – How to setup payor groups
- Lesson Three – How to setup payor group rankings
- Lesson Four – How to create payor plans
- Lesson Five – How to update and delete payor plans
- Lesson Six – How to add exclusion rules
- Lesson Seven – How to setup 1099 reports
- Lesson Eight – How to setup General Ledger accounts for trust management
- Lesson Nine – How to setup disbursement frequencies for Trust Money Management disbursements